**Core Concept: Assigning users to workflow queues or actions**

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| Script  |
| Welcome to the AmpliFund Core Concept video focused on assigning users to workflow queues or actions.  |
| Before we dive into the process of assigning users, a few key reminders and recommendations on users.  One or more users can be assigned to action.  Use caution when assigning multiple users as anyone assigned can complete the action, as someone could mistakenly move the application forward to the next queue before all steps are complete.  We recommend having one user responsible for moving applications between queues.  Also users can be assigned at the queue or action level.  Users assigned at the queue level have access to all actions within the workflow and can complete actions in any order.  We recommend making sure you’ve watched our video on the Opportunity Application Review workflow actions prior to assigning users so you understand all actions available.  |
| Within the workflow you’ll have the options to assign users at the queue level, which is circled in red here or the action level, circled in purple here.  We’ll demonstrate both in AmpliFund shortly.  |
| When an application moves between queues, users who are assigned actions will receive an email based notification like the one pictured here.  It will provide them with the application name, what queue the application has entered and a link to the workflow actions in AmplIfund.  You can also access workflow actions via the Activities page in AmpliFund.  |
| Let’s jump into AmpliFund and assign users together.  First, from the calendar navigate to Award Management then Fund Opportunities.  |
| Select your applicable opportunity.  |
| That will navigate you to the opportunity details, from this screen  |
| Click on Configuration then Workflow settings.  |
| As part of another Core Concept video we showed you how to assign the Opportunity Application review workflow so you should see the workflow details on the screen.  Click on the pencil next to the workflow name.  |
| From the workflow details page, click on workflow queues.  |
| From the workflow queues you can add users to the queue or action level.  Let’s first demonstrate how to assign a user to the queue level.  I’ll click on the pencil icon next to initial review for completeness, which is the first queue in our workflow.  |
| When I click to edit the queue, I am on this details page.  Looking under user permissions, I can select any user in my account to assign to this workflow queue.  Remember, users assigned to the queue level can take any action in the queue.  Also, assigning users supersedes any security role they are assigned.  After I select one or more users, I can click save to save my changes.  Next let’s look at assigning users at the action level.  |
| By expanding my queue, I can see the actions under the queue, to assign a user to each action, I can click on the pencil icon next to the name.  I’ll click on review application pencil.  |
| On the action tab, I have similar details and can assign one or more users under the user permissions tab, then click save.  It is important that every action you want to have happen in the workflow has an assigned user either at that action level or at the queue level above it.  |
| Now let’s transition back to next steps.  As part of your Working with Workflow launch email, we provided you with a workflow configuration document.  Add your assigned users to this document, this will serve as a way for us to help confirm that when you configure the workflow in the system users are assigned in the right stop.  Then, jump into AmpliFund and try assigning your users as you have them built in the configuration document.  Once you have done that, send your configuration document to AmpliFund at support@amplifund.zendesk.com.  We’ll confirm that the users you assigned are in place matching the configuration template before our next consultation call.  |
| Through this Core Concept video you learned how to assign users to workflow queues or actions in AmpliFund.  Should you have additional questions, please visit our support site.  Thank you!  |